Process	***Creating a Sub-classification***
Process Number	***GL – 031***

Description of Process

Create a new sub-classification.   Sub-classifications are created when a new budget line item results from the creation of a new appropriation. A sub-classification is a ChartField value that, when combined with a fund, organization, and program code as well as a budget year, identifies a unique appropriation budget key.   An appropriation is an authorization to make an expenditure. The sub-classification ChartField will track what was formerly referred to as the Object Class. Sub-classifications are created at the business unit level.

Input to Process

Sub-Classification Change Request is written up, signed, assigned an identifier and approved. The sub-classification is then entered into PeopleSoft.

Output of Process

New sub-classification is created and is accessible to all business units having access to the SetID under which the sub-classification is created.

Service Level Agreement Required? (if yes, provide a brief description)

N/A

PeopleSoft Panel Groups being Used

Function	Panel Group
Use	Sub-classification

### Business Process Description

Process Description	Responsibility (Agency/Centralized)
Step 1: Complete request form to create a new sub-classification The Department of Audits will fill out a sub-classification change request form when a new appropriation bill necessitates the creation of a new sub-classification. Once approved, the request will be forwarded to FSS for input.	Centralized
Step 2: Create identifiers for the new sub-classification Enter the SetID and Sub-classification Code for the sub-classification you wish to create. The SetID should be equal to the business unit for the sub-classification you are creating.	Centralized
Step 3: Define the sub-classification Enter the Effective Date and Status for your sub-classification. The Effective Date can be set to the current or a future period and determines the date on which the sub-classification will go into effect. The Status refers to the availability of the sub-classification for use in journal processing. The default status for a new sub-classification is "Active." If the Status is "Inactive" you will not see the sub-classification when prompting for a list during journal entry. Enter a short description to identify your sub-classification. PeopleSoft uses the short description on panels and online inquiries with limited display space. The description field is thrity (30) characters in length.	Centralized
Step 4: Save the sub-classification The sub-classification is now saved and will be accessible to all users with access to the SetID under which the sub-classification was created.	Centralized
Step 5: Add sub-classification to the appropriate trees Add the sub-classification to the designated tree structure so that it is accessible for reports.	Centralized
Step 6: Notify the requestor that the sub-classification has been added Send notification to the requestor that the sub-classification has been added and is available for use. The following are acceptable forms of notification: • E-mail • Facsimile • Interoffice Memorandum	Centralized

Forms Used with Process (#)

**Attach sample form(s) \\DOAS_COMMONS_01\VOL1\DATA\COMMONS\PDocs\Financials\GL-General Ledger\Business Process Flows\ChartField Maintenance\Subclass\Sub-Class Change Request.doc

Process Flow Diagram (if appropriate):
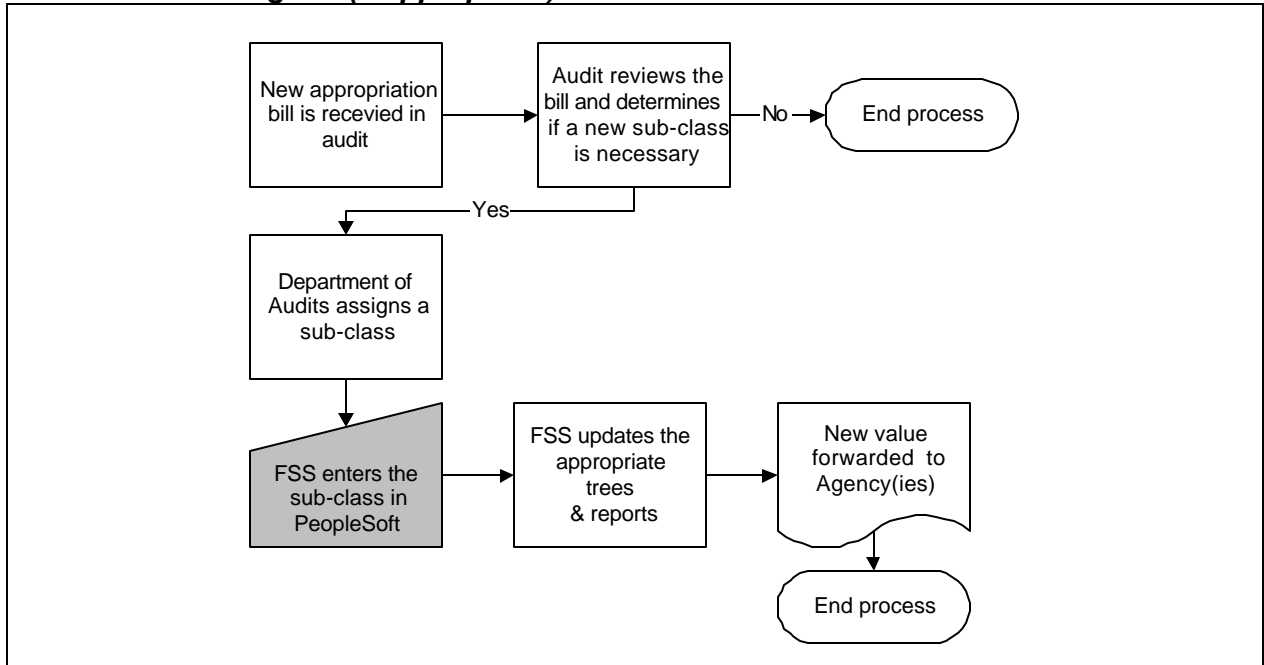
Process Signoff

Tested By
Date Tested